

Transitioning Old and New Officers

Leadership transitions require facilitation, time, and attention. Creating a smooth officer transition requires planning by the student leaders. While many fraternity/sorority advisors feel like the burden is on their shoulders to do this work, the responsibility of the officer transition process is one that should be put squarely on the shoulders of the students themselves. This is an important closure process as well as a final leadership responsibility for the outgoing officers.

A campus professional can help instill the value and purpose of leadership transitions. S/he can also help guide the planning for transition activities.

Stephen Covey was right when he asserted that effective leaders “begin with the end in mind.” Transition discussions shouldn’t start the last month of a leader’s term of office. Both you and your students should think about the transition process, talk about it, and plan for it.

Leadership transitions can be tough for a variety of reasons. You’ve heard the excuses before:

- I’ve got too much work to do to think about a transition.
- I figured it out myself – they can too.
- It’s not my responsibility! Someone else was supposed to...
- I lost everything in my binder. Sorry!
- Everything is in my head...I didn’t write anything down.

That last excuse is quite common. When things get really hectic, the last thing most students think of doing is recording what they know for their successor. Here is a simple list of items that should be in every officer’s manual/packet:

Transition Packet

Must Haves

- Organization constitution and by-laws, policies, procedures
- Current mission statement – the purpose of the organization
- How to work/communicate with the campus fraternity/sorority advisor
- How to work/communicate with volunteers and headquarters staff
- Robert’s Rules of Order

Officer Job Description

Position descriptions with responsibilities of all roles within the organization (positions, projects and committees).



**Association of Fraternity
Advisors, Inc.**

**9640 N. Augusta Drive,
Suite 433**

Carmel, IN 46032

317-876-1632

317-876-3981 (fax)

www.fraternityadvisors.org

PAGE 1

Office Specific Information

- “Words of Wisdom” to be passed from leader(s) or committee(s) to the next leader(s) or committee(s)
- Historical files
- Necessary supplies
- Required paperwork with sample forms
- Communication expectations

Office Vision Statement, Goals, and SMART Objectives

Visions, Goals, and Objectives created by the officer and his/her committee consistent with the organization’s goals. SMART Objectives (Specific, Measurable, Attainable, Realistic, and Timely) help new officers understand the status of goals as well.

Calendar of Key Events (based on the academic calendar)

- Critical institution dates
- Organizational dates
- Holidays
- Special events
- Past leadership team’s calendar of events
- Predecessor’s projected calendar for the coming year

Key Contact List (a “cheat sheet” of local and campus contacts by name, office, phone number and reason for contacting them)

- Direct alumni advisor(s)
- Campus and community resources
- Prior office holders
- Other people needed to support the officer

Officer’s Evaluation (done by each office holder)

Ideally this section should be added onto annually. It provides advice to one’s successor and future office holders. At minimum it should contain the evaluation of the current year’s programming (or other operations related to position) and notes on what worked well and what didn’t.

Notes on Specific Events/Functions

The dates for the next officer training and transition should be documented to get the next set of officers thinking “with the end in mind.”

Pertinent Financial Records

Information on how all financial matters should be handled (spending, receipts, budget requests, etc.)

- A complete set of financial records
- Sample forms

Roster

- Leadership roster
- Membership roster



Association of Fraternity
Advisors, Inc.

9640 N. Augusta Drive,
Suite 433

Carmel, IN 46032

317-876-1632

317-876-3981 (fax)

www.fraternityadvisors.org

PAGE 2

Chapter Advisor Information (for chapter officers)

- Contact information
- Role and responsibilities
- Responsibilities related to transition process

Transition Process

At the beginning of a leadership term most newly elected student leaders believe more is better – the more information, communication, and “ramping up” time the better. Complete transition packets, retreats and/or meetings with their predecessor, and a full understanding of expectations for the office will help a new officer feel more confident, capable, and secure. He/She won’t feel like a new wheel has to be created or old information hunted down if it’s all pulled together in one packet.

Some leadership teams plan a full retreat with the old and new teams together; and then the outgoing officers leave for the new team to create their goals and plans for the year. Others structure or encourage one-on-one discussions between old and new officers. Some teams simply have informal conversations or a question/answer session around transition topics such as:

- What was your transition like when you took office?
- What did you wish was covered?
- How could you have been better prepared?
- What were your greatest mistakes and lessons learned from them?
- If I could give one piece of advice to the new team, it would be _____
- If I could do my year all over again I would _____

Remember that part of learning for the students is the process of closure and new beginnings. Help them think about this important leadership responsibility sooner rather than later. It will help them end their terms on a strong note – and set up the new team for success.



**Association of Fraternity
Advisors, Inc.**

**9640 N. Augusta Drive,
Suite 433**

Carmel, IN 46032

317-876-1632

317-876-3981 (fax)

www.fraternityadvisors.org

PAGE 3